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ABSTRACT

Faced with dwindling financial resources and increasing instructional and administrative responsibilities, teachers continue to spend considerable amounts of their own money on their classrooms. A survey seeking information about out-of-pocket expenditures on behalf of their teaching was conducted in south central Minnesota. Although the sample was not random, it represented a diverse population of teachers (N=907), including teachers from all pre-college levels and varied experience categories. Results indicated an average expenditure of \$492 per year per respondent. Narrative comments by teachers revealed that this figure did not include tuition, conferences, and workshops intended to improve teaching. These dollars were spent directly for the classroom and allied instruction. These results suggest that approximately \$23,000,000 may be spent by Minnesota teachers alone each year, and that nationally billions of dollars may represent teachers' out-of-pocket expenditures for their classrooms. Three appendixes provide the cover letter distributed to 2,617 classroom teachers; the survey instrument with numerical results; and qualitative results. (LL)

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39

Title: The Hidden Cost of Education: A Study of the Out of Pocket Annual Financial Expenditures of Teachers

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Abstract

Faced with dwindling financial resources and with increasing instructional and administrative responsibilities, teachers continue to spend considerable amounts of their own money on their classrooms. A survey seeking information about out of pocket expenditures on behalf of their teaching was conducted. Although the sample was not random, it represented a diverse population of 907 teachers, including teachers from all pre-college levels and experience categories. Results indicated an average expenditure of \$492 per year per respondent. Narrative comments by teachers suggested that research on this topic is necessary and that perhaps higher expenditures may in fact be the case. These results suggest that if this figure is representative, approximately \$23,000,000 may be spent by Minnesota teachers alone each year, and that nationally billions of dollars may very well represent teachers' out of pocket expenditures for their classrooms.

Introduction

For a decade our nation has been deluged with reports on teaching, most of which paint a distressing picture of the nation's schools. As if taking the lead from A Nation at Risk (National Commission on Excellence in Education, 1983), which warned that the school system might as well have been the work of an enemy, education has been under the magnifying glass, its flaws and shortcomings exposed for all to see. The result has been a fever of public disenchantment and skepticism, a mounting distrust of both teachers and administrators and a vaguely defined but seriously intended mandate for school improvement, although to be accomplished with fewer, not more dollars. The common (mis)perception is that teachers are overpaid and underworked.

As if to compound the Herculean task of school reform and improvement, the recent decades have seen schools burdened with the additional tasks of addressing, if not curing a plethora of social ills. Along with rapidly changing instructional approaches, the school

ED 376 158

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system has been asked to address problems of racism, of global awareness, of multicultural appreciation, of alcoholism and drug abuse, of violence and of sexually transmitted disease. Individual differences must be taken into account and instructional practices tailored to idiosyncratic needs and learning styles. Inclusion in the regular classroom of students formerly, if mistakenly, relegated to special education classrooms has taxed the inventiveness and skills of the classroom teacher. And site-based management principles have seen some slight ascendancy, empowering a minority of teachers, but also adding to their professional burdens.

Indeed, teachers often feel themselves under siege, with a need to prove themselves before a disbelieving public audience. Some are made to submit to skills tests (Clinton, 1993), there being little confidence that teacher preparation institutions have adequately screened candidates ~~for~~ effectively prepared those whom they recommend for teaching licenses. Accountability has sometimes powered reform of practice but has also been used punitively by administrations fearful of public scrutiny and judgment.

There is no doubt that contemporary challenges are embraced with eagerness by classroom teachers, many of whom retain an idealism that belies public discontent. Of all the critics, they are most often hard on themselves, acutely aware of both institutional and personal deficiencies even as they passionately undertake the mandates that seem endless. They retain a fervor about improving their own instructional practices and about bettering systems in dire need of their inventiveness. But their focus is primarily on what occurs in their own classrooms, secondarily on systemic change. They are, after all, responsible for teaching—tomorrow and next week and next month. Their students are their first concern.

Still, the winds of criticism and reform buffet them. They find themselves in a society which demands much of them yet provides insufficient support for all they are to expected to accomplish. Per pupil expenditures in the United States lag well below those in the majority of industrialized countries (Rasell, 1990), despite our claim to hold education in high regard, and the status of teachers in our country remains low (Nelson, 1991).

With these thoughts in mind, and beliefs well established, we became interested in the out of pocket expenditures of classroom teachers, and decided to collect information about the moneys teachers spend to support their practice. Would such data support the notion that teachers do indeed contribute very real personal resources to the daily operations of their classrooms? To what extent do teachers spend their own moneys for classroom instructional purposes?

Review of the Literature

We could locate only a single study (Latham and Fifield, 1993) concerning how much money teachers spend out of their own pockets on their classrooms. The Latham and Fifield study found that 360 teachers whom they sampled in the west contributed \$454 of their own dollars on education of their students per year. (The figure reported in Educational Leadership is \$444, but Dr. Latham indicated in a telephone conversation that this is a clerical error.) Latham and Fifield surmised that, if their figures were representative of the teaching population, "teachers nationwide are spending more than \$1 billion annually for their classrooms" (p. 44).

Methodology

This research used a traditional survey originally developed by Latham and Fifield (1993). Their instrument, slightly modified, was used to collect these data. The original Latham and Fifield version had been piloted by them, and was reviewed by these researchers and several potential respondents for validity. Also, it was reviewed by two persons on our university research staff.

The survey and cover letter (Appendixes A and B) were distributed to 2617 classroom teachers working in public schools located in south central Minnesota. Physical distribution was handled by 11 third party teaching professionals and several support staff from local districts. A total of 907 instruments were returned, a response rate of 35%. No follow up reminders were mailed, and no special incentives were available.

Sample Demographics

This sample consisted of 907 K-12 classroom teachers assigned to teaching positions located in south central Minnesota. The average age of respondents was 43.5 years, and 286 or 31.6% were male, while 620 or 68.4% were female. The majority of respondents (70.5%) reported living in families with two or more sources of income and participants responding reported earning an average salary of \$33,600. It is interesting to note that 42.7% of the sample reported teaching in rural schools, 23.8% reported teaching in urban settings, 27.4% reported teaching in suburban schools, and 3% taught in other settings. Those reporting indicated teaching an average of 81 students each day. This may indicate that many schools were organized departmentally, or simply that teachers teach several different groups of students each day. It is likely that the sample includes teaching

specialists, typically responsible for teaching a variety of classes each day. Respondents reported teaching many grade levels, some indicating responsibility for teaching several grades. The following table summarizes the grade level teaching assignments indicated by those responding.

Table
Grade Level Teaching Assignments of Respondents

<u>Grade Level</u>	<u>N</u>
Elementary Grades K-6	651
Middle School Grades 7-8	93
High School Grades 9-12	214

Some teachers had teaching responsibilities which did not fall within these traditional divisions. Those responding indicated approximately an average of 18 years of teaching experience, and reported a total of 16,123 years of teaching.

It could be said that this sample was very experienced, representatively distributed between males and females (reflecting the distribution found in public education today), and representative of the kinds of teaching positions which exist today.

Results

Teachers reporting spent an average of \$492 per year on behalf of their students, a figure slightly higher than Latham and Fifield had uncovered. Many teachers stated they were reporting minimal figures because of our own insistence on accuracy. The actual figures are likely higher, but apparently many teachers do not itemize tax deductions (we encouraged use of tax records if available) and voiced complaints that their expenses were not deductible since they did not reach the allowable percentage.

We noted that the average spending figure did not include tuition, conferences and workshops intended to improve teaching, although some respondents included those expenditures as well. For the most part, these were dollars spent directly for their classrooms and allied instruction. For example, we sought amounts spent for instructional

supplies, instructional materials, audio-visual aids, incentive and motivational items, food, and for computer software and hardware.

Concerning the latter, it is remarkable that the computer has become a standard tool of teachers; were it not for professional use, we believe, there would be many fewer computer purchases. Since many classrooms in Minnesota are now equipped with computers, teachers have adopted its use and absorbed related expenses. For those who purchased a computer during the past year, the average spent was well over \$1000. Of course a significant number of teachers can be assumed to have purchased computers prior to the year of our survey.

Themes and Observations

We collected comments from teachers about their spending; one teacher's comments told the story clearly and well:

This study is long overdue, and I strongly agree that out of pocket spending...should be given greater attention. Teachers are asked to change or update curriculum frequently, to add programs, and change grade levels. Though basic texts are provided, motivational..., high interest (enrichment)...materials are not. To make my job easier and to motivate learning, I spend money on high-interest materials....We are also asked to save money by reusing workbooks from year to year, counting and limiting Xerox copies...and the latest—return our paycheck envelopes for reuse....I've come to terms with the reality that a portion of my salary must be spent in order to meet expectations and provide the learning environment I feel my students deserve.

Many teachers voiced similar opinions: "If it's to improve my job, I'll spend it. If it helps kids, I'll spend it." Yet some expressed anger and frustration and steadfastly refused to spend their own money: "There is no other career where people [are asked to] spend so much of their own money" and bristled that such spending was becoming an expected norm. While many schools have at least some funds for reimbursement of purchases, teachers complain that the processes are too cumbersome for each of the small expenditures; yet these can add up to significant spending. And much buying is done on a need basis, for example, in support of a unit currently being taught.

It is clear that teachers spent significant amounts of their salaries for teaching related purposes. Out of pocket spending is necessary, often resented, and totally unacknowledged in either the literature or in public awareness.

Conclusions

There were 46,517 classroom teachers in Minnesota in 1992-93 (citation). Assuming that the average spending of all teachers was nearly \$497, this would represent a total contribution of nearly \$23 million for instructional activities statewide by classroom teachers. In Minnesota, per-pupil state contribution to education is \$3,050, and teachers' contributions represent approximately 15% of that figure. Extrapolating the average spending by teachers in this research, to the nation's teaching population would yield a figure, as suggested by Latham and Fifield, in well over a billion dollars.

Thus, even though faced with increased responsibilities, little social status and modest salaries, southern Minnesota classroom teachers contributed significant amounts of their own money for instructional purposes. These research results do indeed replicate the Latham and Fifield 1991 results. These researchers recommend that further research be conducted. Particularly, it would be helpful to know if private school instructors spend similarly, if school administrators (public and private) spend similarly, and if higher education instructional personnel spend in similar fashion. As schools move to site based management and decision making and as teachers become more empowered, it would be interesting to monitor changes in out of pocket spending patterns.

References

Latham, G. and Fifield, K. (March 1993). The hidden costs of teaching. *Educational Leadership*, pp. 44-45.

National Commission on Excellence in Education (1983). *A Nation at Risk: The Imperative for Educational Reform*. A report to the nation and the Secretary of Education. Washington, D.C.: U. S. Department of Education.

Nelson, F. (1991). *International comparison of public spending on education*. Research Report. Washington, D.C.: American Federation of Teachers, AFL-CIO.

Radcliffe, D. (1993). *Hillary Rodham Clinton*. New York: Warner Books. Mrs. Clinton was a key player in the school reform movement in Arkansas. Following the initiative of that state, many other states implemented testing of either in-service or pre-service teachers.

Rasell, M. (January, 1990). *Shortchanging Education: How U.S. Spending on Grades K-12 Lags Behind Other Industrial Nations*. Washington, D.C.: Economic Policy Institute Briefing Paper, January, 1990. ERIC document ED318126. Rasell indicates that U.S. spending ties for 12th place among 16 industrialized nations in both public and private spending. When only public spending levels are compared, the U. S. drops to 14th place. A rebuttal by the Department of Education (ERIC document ED318127) maintains that, using a purchasing power parity (PPP) formula, the U.S. is second to Sweden out of 22 Organization for Economic Cooperation and Development countries. However Nelson (*International comparison of public spending on education*. Research Report, Washington, D.C.: American Federation of Teachers, AFL-CIO, February, 1991), using the PPP formula, found that the U.S., "despite having the highest standard of living in the world" (p. 2), ranked sixth out of 15 industrialized nations in per pupil spending, fifth in spending per capita, 12th in overall spending for education according to percentage of Gross Domestic Product and 11th in spending for public elementary and secondary education. According to F. Howard Nelson, op. cit., columnist Paul Craig Roberts, writing in the *Washington Times*, February 26, 1990, has suggested that fully half of public funds go to administration. Nelson also chastises the level of teacher salaries in the U.S.: "With the highest standard of living in the world and the highest paid workers in the world, U.S. teachers should be the most highly paid workers in the world just to maintain a teaching force of similar quality to other advanced nations," p. 8.

Appendix A

Cover Letter

Dear Colleague:

Enclosed is a one page questionnaire we would appreciate your filling out and returning in the enclosed envelope. It should not take a great deal of time.

We are trying to determine how much money teachers spend voluntarily, out of their own pockets, in support of their work in the classroom. While doing a review of the literature, we were surprised to find only a single article on this matter, published last fall, though there is a mountain of literature on school finance generally.

As the controversy on school funding rages on, we think it is extremely important for the public to know something about what teachers voluntarily spend in their own classrooms, out of pocket, on behalf of their teaching and their students. Your help in completing this study will be appreciated very much.

Your responses will be considered completely confidential and anonymous. You will notice a number in the lower left corner of the return envelope. This corresponds to a master list of numbers (no names) which will allow us to determine response rate for each participating school of the Laboratory District Teacher Education Center.

Many of you will have taken tax deductions for some or all of these expenses. Please refer to your tax forms to ensure accuracy. Those of you who do not itemize deductions may want to refer to your check registers. In some cases you may simply have to estimate, but please do so as accurately as possible.

We very much appreciate your taking the time to complete and return the questionnaire. It is our intent to disseminate the findings broadly both through the popular press and national journals.

This study is supported by a research grant from the Laboratory District Teacher Education Center of the College of Education.

We believe this is a significant study and will do much to raise public awareness of teachers' personal contributions to their instruction. Thank you very much for participating.

Important: Please return this survey within ten days of reception.

William Olszewski & Kathleen Maury
Mankato State University
April 15, 1994

Appendix B

Instrument with Numerical Results

April 15, 1994

Dear Colleague:

This information will help greatly in our study of the voluntary, out-of-pocket spending of teachers on behalf of their classroom teaching. Thank you for your participation.

I. ABOUT YOU

- A. Male 286 = 32% Female 620 = 68%
- B. Age $x=$ 43.6
- C. Years you have taught: $x=$ 17.93
- D. Grade(s) you now teach: k-6, 512; 7&8, 93; 9-12, 214
- E. Approximate total number of students enrolled in your class(es) each day: $x=$ 80.57
- F. Which of the following best describes your school's setting:
43% Rural; 24% Urban; 27% Suburban; .6% Inner City; Other (specify) 2%
- G. Is yours a single family income? 29% Yes 71% No
- H. Your annual teaching salary (to the nearest hundred): $x=$ \$32,537

II. ABOUT YOUR SPENDING .

What will you have spent this school year on the following (estimate if necessary)?

- A. Instructional supplies (paper, pencils, paints, etc.) $x=$ \$29.62
- B. Instructional materials (books, games, manipulatives, etc.) $x=$ \$78.04
- C. Audio-visual aids (videos, posters, films, etc.) $x=$ \$26.70
- D. Incentive/motivational items (stickers, stars, edibles, etc.) $x=$ \$42.36
- E. Food (to support a class activity, to feed a needy student, etc.) $x=$ \$30.29
- F. Professional literature (books, journals, newsletters, etc. Do not include membership fees in professional organizations or unions) $x=$ \$60.52
- G. Computer software (programs, instructional games, etc.) $x=$ \$25.15
- H. Computer hardware (computer, printer, modem, etc.; if you depreciated it on your 1993 tax form, give depreciation amount) $x=$ \$143.29*
- I. Other (such as non-reimbursed car miles). Please describe
car miles; workshops; conferences, etc. $x=$ \$55.70

TOTAL $X=$ \$491.67

*While this is an average, many did not buy computer hardware during the survey year; those who did spent an average of \$1048.

Many teachers wrote that the figures they provided were minimal amounts.

Nearly two out of three teachers (66%) wrote comments. Some themes, observations and comments can be found on the reverse side of this sheet.

We will try to publish our findings locally and nationally.

William Olszewski

Kathleen Maury
Mankato State University

Appendix C

Qualitative Results Themes and Observations, Comments

Below are some teachers' comments, summarizations of comments and observations (in boldface).

- Labor (painting, building, etc.) and other time is volunteered as well as "academic" time.
- I don't mind spending: it benefits teaching and makes it easier, more enjoyable.
- "If it's to improve my job, I'll spend it. If it helps kids, I'll spend it."
- The public doesn't understand what we contribute [of money, time, effort, care, etc.] and thinks poorly of our status and efforts; we are unappreciated and expected to subsidize instruction.
- "My Shopko and Musicland bills (for school) were larger than my grocery bill."
- Spending is part of professional development: to improve teaching.
- "There is no other career where people [are asked to] spend so much of own money [for what is necessary for good instruction]." "To be up-to-date, purchases are necessary."
- Many do incidental purchases themselves; reimbursement is too cumbersome for expenses under \$10; difficult purchasing systems push people to spend own money.
- Many say they're giving conservative, low estimates.
- "I buy because it helps me to be the best teacher I can be."
- "By spending we add to the problem, are enablers of those who won't provide"; some won't spend own money on principle: "spending our own money is nuts."
- Much feeling that public and legislators don't know or care about what they do or spend (of own money).
- We are expected to do more and more with less and less.
- "Teachers with their own kids in school contribute doubly, triply."
- "I do what it takes to reach my students."
- "I will spend 0 from my own pocket."
- "I believe that education is charged with the task of preparing students for the 21st century on a 19th century budget."
- When the economy is bad, teacher spending is reduced.
- "I do whatever it takes to reach my students."
- Parents, students and others have come to expect teachers to buy things for class.
- "If I am going to be spending eight hours a day there [in the classroom] I want it to look good! Therefore I spend most of my own money on posters, etc.!"
- There were many appeals for reimbursement or tax credits.

This would be bargain for the state, since it would mean only about one-third of costs of reimbursement; and it's likely the average spending would rise.

- Inequality among school districts means inequality in spending.
- Many do incidental purchases themselves; reimbursement is too cumbersome for under \$10 expense; difficult purchasing systems push people to spend own money.

In 1992-93 there were 46,517 full-time classroom teachers in Minnesota. If all averaged \$492, it would represent a contribution of \$22,886,364 by teachers to state education each year. If this were a national average, teachers would contribute well over one billion dollars annually.

Many thanks to those who responded!